



Managing A Commercial Activity Study



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Today's Agenda



- Methodology
- Comprehensive Competition Plan
- Communication
- Teams and Firewalls
- Training
- Costs and Savings
- Regulatory Guidance
- Comprehensive Files
- Information Handoffs



Methodology



Centralized Management

- **Requiring Activity (RA) provides**
 - o A-76 Subject Matter Experts (SMEs)
 - Preliminary planning support
 - PWS support
 - MEO support
 - CGA support
 - o Training
 - o Policy guidance and oversight
- **The RA is the final arbiter**





Comprehensive Competition Plan



- Includes roles and responsibilities, project plans/ plans of action and milestones (POAM), decision makers, training, issue resolution process and communications plan
- Provides the studies with momentum from start to finish
- Defines level of commitment on the part of Top Managers within studied organizations
- Provides the milestones against which the PWS Team Lead and CO will be measured



Communication



- Utilize various media (i.e. newsletters, websites) to maintain communication with the workforce
- Meet with the workforce or union monthly
 - Required by law
- Good communication will help to promote “buy-in” from all stakeholders
- Communication “involves” the workforce



Teams & Firewalls



- Developers of the PWS, independent government estimate (IGE) and solicitation package must be “firewalled” between developers of the Agency Tender and the Agency Cost Estimate (ACE)
- Retain team members
- Have nondisclosures and conflict of interest statements signed



Training



- Preliminary Planning
- Performance Work Statement (PWS)
- Agency Tender and Agency Cost Estimate (ACE)
- Oral Presentations
- Continuing Government Activity (CGA)

Exercises used to enhance training experience, handbooks developed to provide assistance on-site, templates make the process easier.

Student evaluations lead to lessons learned and enhanced future training



Costs & Savings



- Establish methods early on to track costs by location and competition process (i.e., Agency Tender costs, PWS costs, source selection, etc.)
- Maintain auditable, organized records
- Monitor costs regularly to ensure accuracy
- Learn COMPARE, CAMIS, local financial reporting systems and available reporting methods
- Maintain currency of CAMIS data



Regulatory Guidance



- Revised Circular and future updates
- Federal Acquisition Regulation (FAR)
- Procurement integrity, ethics and standards of conduct
- 10 USC
- FAIR Act
- Internal practices and procedures





Comprehensive Files



- **Acquisition (Competition File)**

- Required by Circular
- Assists in answering questions about the RFP in a consistent manner
- Includes:
 - PWS
 - Workload data
 - Maps & listing of local delivery points & schedule
 - Backup to support consumable material TE
 - Past performance
 - Amendments
 - Customer review comments
 - Operations
 - Preliminary documents

- **Agency Tender**

- Required by solicitation
- Assists in documenting analysis, decisions and rationale in building MEO
- Includes:
 - Complete Agency Tender
 - Employee interviews
 - Technical estimates/engineered standards
 - Process improvements
 - Crosswalks
 - Management decisions
 - MOUs/MOAs
 - Records of technical leveling/discussions
 - Records of discussions with union



Information Handoffs



Transition Team

Agency Tender
Phase-in Plan
Solicitation

CGA

Training &
Handbook
Solicitation
Agency Tender
or Contract

Contractor

Contract

MEO

Solicitation
Agency Tender
Position Descriptions &
Briefing on Expectations
Phase-in Plan
Rules for Requesting
Deviations
MEO Letter of Obligation

